



ISIS HR Quick Tips

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Maintaining the Appraisal Record in LAGov HCM

This document has been created as a resource to assist LAGov HCM (ISIS Paid and Non-Paid).

To ensure accurate output for the PPR Annual Report, appraisal records must be maintained appropriately in LAGov HCM. Maintenance as shown below will also avoid errors in appraisal reports.

The appraisal infotype is created to record the rating period for employees. The infotype must be created with an effective date to reflect the rating period based on anniversary date or focused rating date. The auto-create program that creates this infotype 90 days prior to the anniversary date has been temporarily suspended, so agencies will be required to manually create this appraisal infotype.

RATING PERIODS FOR STATE CLASSIFIED EMPLOYEES

ACTIVE ELIGIBLE EMPLOYEES

- Create the Appraisal infotype (0025) based on the anniversary date or focused rating date.
- Anniversary Date period is 'FROM' (date after anniversary date) 'TO' (anniversary date)
 - Anniversary date is 9/14
 - Appraisal period should be reflected as 9/15/10 – 9/14/11
- Focused Rating Date period is 'FROM' (focused rating date begin) 'TO' (end of rating year)
 - Focused rating date is 7/1
 - Appraisal period should be reflected as 7/1/10 – 6/30/11

MAINTAINING THE APPRAISAL INFOTYPE (0025)

SEPARATIONS FROM STATE SERVICE

*If an employee separates from state service **within 60 days** of the anniversary date or focused rating date, the supervisor **may** render the rating. This is not required but highly encouraged.*

*If an employee separates from state service **longer than 60 days prior to** the anniversary date or focused rating date, the rating is not required.*

- If an appraisal record has already been created for the rating year and the supervisor is not rating the employee upon separation, HR should **delete the IT0025** (appraisal infotype) in the Separation (or after the action has been completed).
- If an appraisal record has not yet been created for the rating year and the employee separates during that rating year, there is no action or entry required.

Note: When the IT0025 is deleted or not established for the separating employee, the employee will not appear in the detail on the zp117 report and the inactive employee will not be included in the count as receiving a rating during that rating year in which he was separated. This will provide an accurate count and accurate report.

EMPLOYEES WHO TRANSFER TO OTHER LAGov HCM agencies (both agencies on LAGov HCM)

If an employee transfers from one LAGov HCM (ISIS) agency to another LAGov HCM agency, the rating will either be required of the losing agency or the gaining agency depending on the transfer date.

*If the transfer date occurs **within 60 days** of the rating date, the losing agency should conduct the PPR rating.*

*If the transfer date occurs **more than 60 days prior to** the rating date, the gaining agency must conduct the PPR rating.*

- If an IT0025 has been created for the rating year and the transfer is within 60 days of the rating date, the losing agency should conduct the rating and update the IT0025.
- If the losing agency does not conduct the rating nor update the IT0025, the losing agency should **not** delete the appraisal infotype until after the gaining agency completes the transfer process.
- The gaining agency should update the appraisal rating period in the transfer action with new dates reflected as “transfer” date to end of rating period.
 - Example: Transfer effective 3/12/11
 - Anniversary date is 7/2/11
 - New rating period should reflect 3/12/11 to 7/2/11
- The losing agency should now delete the appraisal record after the gaining agency’s transfer is complete.

Note: Deleting the appraisal record when a rating was not conducted prior to a transfer will exclude the employee’s record reflecting 0.00 as a false unrated rating.

EMPLOYEES WHO TRANSFER TO OTHER AGENCIES NOT ON LAGov HCM (non-ISIS)

*If an employee transfers to an agency not on the LAGov HCM system (non-ISIS) **within 60 days** of the anniversary date or focused rating date, the supervisor **may** render the rating. This is not required but highly encouraged.*

*If an employee transfers to an agency that is not on the LAGov HCM system **longer than 60 days prior to** the anniversary date or focused rating date, the rating is not required.*

- If an appraisal record has already been created for the rating year and the supervisor is not rating the employee, HR should **delete the IT0025** (appraisal infotype) in the Transfer-Losing transaction (or after the action has been completed).
- If an appraisal record has not yet been created for the rating year and the employee transfers out to a non-LAGov HCM system, there is no action or entry required.

Note: When the IT0025 is deleted or not established for the employee transferring out to a non-LAGov HCM agency, the employee will not appear in the detail on the zp117 report and the inactive employee will not be included in the count as receiving a rating during that rating year in which he was separated. This will provide an accurate count and accurate report.